

Client Onboarding Interview

Online Marketing is the future of all marketing. As the number of internet users keep increasing every day, online marketing will soon wipe out traditional methods of advertising in newspapers, magazines, and television.

While it may be an interesting field to pursue, it can also get tricky because there is no 'one-size fits all' approach to it.

To be an effective Online Marketing Specialist, it's very important that you show genuine interest in your clients' business and tailor your campaigns/strategies according to their needs.

You can't just promise to help your client reach #1 in Google searches or that they'll get 1,000,000 new subscribers without understanding their business, their goals, and their audiences.

This is why the Client Onboarding Interview is very important.

As mentioned in the video, the three methods of doing a Client Onboarding Interview are through:

- Questionnaires
- Phone Interviews **(Recommended)**
- Email/ FB messenger

I recommend phone interviews because I find that I learn more about the business through conversations. Some clients tend to be too lazy to answer questionnaires and emails in full detail. You can also make follow-up questions during conversations which saves time and effort.

IMPORTANT: Don't skip Client Onboarding. It is an important step that separates high value freelancers from low quality ones.

There is SIMPLY NO WAY that you can create an effective campaign based on technical knowledge only. You must be genuinely interested in your clients' business to help them reach their goals.

Client Onboarding Process (Online Marketing)

1.) Find out about the business.

If this was a planned call, you should already have researched some information about the clients' business. Let's say I'm your client, you should have already googled 'Jason Dulay' and have bits of information about my business so you can start the call with:

"Hi, Jason. How are you? I understand that you sell online courses for freelancers, but I would like to ask a couple more questions to get to know your business better."

In this call, make sure to find out about:

a. Their Vision/Mission

What would you say your company's vision and mission is?

b. Their Values/Strengths/Weaknesses

What are the company's top 5 values?

What values or beliefs define your brand?

c. Their Audience

Who are your target customers?

Who are your existing audiences?

What pain points do you solve for them?

How do they find your products?

d. Their Products/Services Offered

What products/services are you offering?

What are its features/benefits?

How much are you selling them for?

e. Their Competition

Who are your competition?

What would you say your competitive advantage over them is?

2.) Discuss their business goals.

What are your marketing goals?

What are your sales goals?

How does successful marketing campaign look like? Is it an increase in traffic? Does it build credibility? Increase sales? Attract audience?

Remember: When talking about goals, stick to Quantifiable Goals or goals that are measurable with numbers, so that you can easily agree on whether a campaign is successful or not.

If they're inquiring about SEO, ask – "**Are you targeting:**

- *An increase in their website's visitors?"*
- *An increase in rankings?"*
- *To gain more leads?"*
- *To spread brand awareness?"*
- *To increase revenue?"*

For Email Marketing, ask – "**Are you targeting:**

- *To grow their email list? (Get more subscribers?)"*
- *An increase in their open rates?"*
- *An increase in their click-through rates?"*
- *To create promoters?"*
- *To spread brand awareness?"*

For Social Media Marketing, ask – “**Are you targeting:**

- *To reach a certain niche of people?”*
- *To increase their Likes/Followers?”*
- *To increase sales?”*
- *To spread brand awareness?”*
- *To improve in CPL, CPC, Conversion rate?”*

3.) Review their Current and Past Situations (in relation to niche).

Do you have an existing online marketing campaign?

Have you had any past campaigns?

Did you get the results you wanted?

a. SEO

How much money is the website making you?

How many people visit the website?

What are their current rankings?

What are their best performing keywords?

What is your site’s Bounce Rates, average Time on Page, etc.?

b. Email

Do you have an existing email marketing system in place?

Are you tracking open rates, click rates, and conversion rates?

What are your best performing emails?

What are your current campaigns?

Do you have Autoresponders in place?

c. Social Media Marketing

Tell me about your past social media campaigns.

Are you tracking conversions or the effectiveness of the campaigns?

What are/were your best performing campaigns?

How much did those campaigns cost you?

How much did you gain?

From this conversation, your aim is to pinpoint the loopholes in their past or existing campaigns AND present a solution. Knowing this, your proposal becomes stronger.

You can say:

"Okay, Mr Client. Here's why I see you're not getting the results you wanted: _____

But I can help you with that. Here's what I can do for you _____

4.) Ask about their available resources.

- **Tools**

Do you have existing tools for tracking and analyzing campaigns?

What tools do you use for your campaigns?

(LongTail Pro, Leadpages, Click Funnels, Drip subscriptions, etc.)

- **Budget**

How much are you willing to spend on the ad campaigns?

**During this Onboarding call, you may need to re-align your clients' goals. Most clients aren't sure what they need or may be too focused on one area to see their real problem.

For example, a client may think that the problem is that he's not getting enough visitors when he actually needs better content to convert visitors into customers.

Once you've gathered these information, it's now time to create a marketing plan. 😊

Your goal is to take your clients from where they currently are TO where they want to be.

If your Online Marketing services effectively help them reach their goals of more sales, more visitors, more visibility, or higher revenues (in line with their business goals), then you ARE a highly valuable freelancer.

Create a Marketing Plan

An effective Marketing Plan should be easy to understand and includes step-by-step information.

It should clearly identify everyone's roles including the client's, yours, and other team members' (if any).

Parts of a Marketing Plan:

- **The Current Situation**
Explain the problem. This part should make clients feel *sad*.
- **The Goals**
Describe what they want to achieve. If you can put their problems and their goals side by side, they'll clearly see the value of your proposal.
- **The Plan**
This is the part where you present your strategic plans. It's 'the bridge' between their current and desired situation where you say, "*Here's what we need to do to achieve this:*"
- **The Seal**
Seal the deal by presenting the required budget, terms and conditions, and the signature fields for both of you.

Sample Marketing Plans

On the following pages, you'll see 2 sample marketing plans to give you an idea on what to create after a Client Onboarding Interview.

The first one is a Facebook Marketing plan for a fictional company I created.

The second one is an actual proposal I made for an online marketing client last year. The company needed help in SEO, Social Media, and Email Marketing.

Since they are in a pretty big and broad industry, I noticed that my client got confused on how to target two similar niches during our Onboarding Call. You'll notice how I addressed this in my proposal.

This client ended up hiring me and is currently one of my long-term clients, so I removed everything that would reveal their identity and their industry for confidentiality purposes.

WWW.WHARRIO

Marketing Plan for ABC Ice Cream Shop

I. Business Overview

ABC Ice Cream Shop is a full-service online ice cream shop. Their mission is to revamp the traditional way ice cream shops operate – breaking the barrier of storefronts by delivering high-quality ice cream products anywhere in the USA.

Strengths

- Highly-engaged Facebook group of 1,000 members
- The ability to scale rapidly as sales increase

Weaknesses

- The lack of brand awareness because most people are unaware of online ice cream shops.
- There are currently no working marketing campaigns in place.
- Facebook group members only like and comment on posts. Less than 5% have actually purchased from the shop.

Opportunities

- A fresh business model within a popular industry
- Target audience is very active on Facebook
- High engagement on Facebook group can be used as leverage for increasing content sharing

Threats

- General apprehension with online businesses
- Online marketing campaigns for the business model has never been tested before

II. Marketing Goals

- Promote brand awareness through an increase in Facebook group members by 100 members monthly.
- To achieve ___% increase in monthly revenue within 6 months of the campaign
- Turn existing customers into promoters through affiliate marketing

III. Action Plan

- Based on my analysis, the most liked and commented posts in your Facebook Group are those that include colorful ice cream and catchy captions. I will work with your writing to create similar content and post one daily.

(insert samples here)

Your audience is mostly on Facebook between 9-10am so I would schedule the posts around these times.

- Spend \$___/day in Facebook Ads targeting the following customer avatar

Gender: Female

Age Group: 20-35

Status: Single

Location: USA

- Most of the competition are targeting the same customer profile as your existing ones. We will perform different AB Tests to check how different groups respond to your ads. This will help us narrow down our audience niche and create stronger, targeted content than the competition.
- Run monthly contests that promote sharing content and inviting friends to the group.

IV. Budget and Timeline

Professional Fee: \$1,000/month

Facebook Ad budget: \$1000/month

Campaign Performance Evaluation will be done every 3 months to assess progress and strategies.

V. Terms and Conditions

A retainer fee of _____ is required before the start of implementation.

Will need to work with your team of writers and graphic designers for Facebook content planning and targeting

I have an existing subscription with Adspresso, my preferred tool for tracking and analyzing Facebook performance. By signing this plan, you agree to have your Facebook group added to my account, granting me access to your user data.

SIGNATURES:

(Signature of Client)

(Signature of Freelancer)

Proposal for Company Name:

Building your Online Brand

www.wfhr.io

Prepared By:

Jason Dulay

Online Marketing Specialist

Jason@wfhr.io

SUMMARY:

I envision Company Name becoming the brand synonymous with _____ in _____, USA. We can do this by proactively providing education, being involved with local initiatives, and people seeing the Company Name brand with these.

TARGET MARKETS:

We should take two different marketing approaches for _____ and _____. My assumption is that these are two distinct target markets. Even though they can be complementary markets, they can be treated and marketed for separately.

ASSUMPTIONS:

- _____ and _____ are two separate markets with their own needs, wants, and desires.
- We can address to these two groups separately, convert them to customers and possibly (in the future) grow the relationship to the other side.
- Each side needs a different marketing approach, which means different keywords for SEO, different targeting for: AdWords, Facebook, and YouTube, and different newsletter mailing lists.

CURRENT APPROACH:

Currently, we're trying to pull in both _____ and _____ customers on one website with the same branding. Even though we have some specific keywords and campaigns specific for each, the branding is the same and is catered more towards _____ customers which may be confusing for _____ customers who visit the site.

METHODOLOGY:

Our main goal is that customers and locals will:

- i. Turn to Company Name for the industry's education
- ii. See Company Name directly involved in community work

This will build a strong brand for Company Name and grow the business immensely.

This approach is heavily focused on:

- Educational articles
- Content upgrades (PDFs, checklists, etc)
- A consistent newsletter
- Social media
- YouTube videos

I've outlined this in the steps below. Keep in mind that _____ and _____ will be treated as separate, but sister entities for most of the steps.

Step 1: Introducing people to the brand and website

- Search Engine Marketing – coming up in the search results when people are looking for keywords specific to Company Name with both SEO and AdWords
- Facebook ads - different comprehensive campaigns promoting videos and blog content focused on brand building for _____ residents

Step 2: Engaging visitors and turning them into leads

To engage visitors, we should stay top of mind. We can do this primarily by getting people on our mailing list.

The newsletter content itself should also be specific depending on what the customer signed up for. We want to speak to our customers' wants, needs, and desires and that should be reflected in the content we send them.

Our content should be high-quality enough that people will sign-up for:

- More educational content and updates
- The content in easy to print, organized formats (PDF checklists, summaries) ○ Discounts, offers, and/or freebies

Another way to engage customers is by targeting them specifically on Facebook (with the same goal of getting them on the mailing list). With Facebook ads and Google Ads, we can specifically target:

- Those who have visited our website
- Those who have read specific articles
- Those who have signed up for the newsletter
- Those who have watched specific videos

Step 3: Converting leads to customers

Research shows that it takes an average of seven interactions before a lead turns into a customer. It will be important for us to identify the average customer conversion cycle and build around that. Our interactions will focus on providing continuous value to our leads, whether or not they become customers, and provide venues for them to become customers if they wish to do so (calls-to-action). Our main channels will be:

- Creating an e-mail list
- Newsletter campaigns
- Facebook ads focused on education and brand-building (not conversion directly) using similar targeting in Step 2
- Google AdWords retargeting

Step 4: Converting customers to promoters

After leads become customers, our newsletter and messaging will change slightly. We will continue to provide value, but will focus more on getting them to share our content with their families and friends. We can have various lists as well for this group depending on level of interaction and needs.

MY PART:

I will be managing all steps of the funnels above, which includes managing SEO, Google AdWords, Facebook Ad campaigns, Newsletter campaigns, content creation, landing pages, and appropriate changes to increase conversion rates.

The only area where I won't have direct interaction is Facebook posts, which should be handled internally but discussed in monthly meetings.

We should have monthly meetings focused on planning, overall strategy, and result discussion (from SEO, AdWords, Facebook, YouTube, newsletter)

I'm also hiring someone with _____ experience to manage content and help me with planning so that we can have quality content that resonates with _____ residents.

RATE: \$2,500/month

SUPPORT NEEDED FROM COMPANY NAME:

What I need from you would be the following:

- Strategic planning on online marketing, branding, content, and direction for the next 12 months
- Monthly discussions on strategy, goals, results
- Coordination with admins to add customers to mailing lists
- Coordination for social media posts and campaigns
- Customer-focused educational videos (at least once a month)

EXTERNAL RESOURCES NEEDED:

- A separate ad budget for Facebook and AdWords, preferably to start \$1,000 with and more once we establish trends

- Videos Created

I understand you have an existing resource that can help with videos. They don't need to be high-quality productions. Focus will be on authenticity and quality.

- Subscription to AWeber (starts at \$19/mo) and possibly other services we deem beneficial
- LeadPages subscription – this is a tool for lead management and tracking. I can just add you on to my Advanced account (worth \$199/mo)

TERMS AND CONDITIONS:

Both parties agree to _____

_____.

The client shall pay a retainer fee deposit of _____ at the time this contract is signed. Said fee is paid solely for insuring the Online Marketing Specialist's time. No portion of the retainer fee is refundable.

SIGNATURES:

_____ (Signature of Client)

_____ (Signature of Freelancer)